

US EXECUTIVE APPROVAL FORM

CUSTOMER NAME: Bank of America

PARTNER/VAD NAME:

SECTION I - Approval Requests:

HQAPP Requests:

1. Execute an Amendment the May 2001 Agreement's Price Hold exhibit to add Real Application Clusters for both Processor and Named User Plus license models to the price hold at a 60% L & S discount.
- 2.

TIER 1 Requests:

- 1.
- 2.

TIER 2/3 Requests:

- 1.
- 2.

Previously approved requests within same quarter for same deal (include date of approval):

- 1.
- 2.

SECTION II – Deal Summary:

Deal Summary (modify as deal changes to reflect your worse case)	
Product Mix:	(List out Programs and Quantities Here)
License Discount	% (ebiz + %)
Support Discount	% (ebiz + %)
Comp & Admin Discount	
Phased Implementation for Comp & Admin?	See checklist below
Support Options/Holds	
Price Holds	
List License	
List Support	
List Comp & Admin	
Net License	
Net Support	
Net Comp & Admin	
Net Price	
Price List Used (specific date)	

Migrations	
Does deal include migration (y/n)	
Discount on migrated licenses	



Migration support - before	
Migration support - after	

Customer history	
Existing contractual discount (price hold)	70% off of UPU's
Date of Price List for price hold	April 01
When does price hold expire?	May 31, 2004
Price hold program categories (database, server, erp, crm, hr/payroll, app suite)	Most all – See attachment
Name of Agreement, if applicable	May 2001 OD referencing SLSA-214563-22-APR-94

SECTION III - Justification:

The bank is very interested in acquiring RAC for a number of upcoming projects. In order to facilitate the acquisition process it is necessary to include the RAC solution in the existing Right To Buy. The level of discount is based on the existing migration path of UPU's (the model of the May 2001 agreement) to a processor (which translates to a 55% discount on processors) plus an additional 5%. This modification will be the first step towards moving the bank to the processor model and begin to establish a mindset for negotiating a future contract this fiscal year. By establishing this Right to Buy on RAC it enables us to position the product with all business lines at a determined price in turn reducing the cycles to close business.

Recommendation: *(leave blank for HQAPP to fill out)*

Submitted By: *(fill in rep name and AVP name here)*

Field RM name if submitted by OracleDirect:

R: *(leave blank for HQAPP to fill out)*

C:

L:

A:

BP:

PLEASE NOTE THAT HQAPP WILL NOT REVIEW ANYTHING BELOW AND NOTHING BELOW WAS CONSIDERED FOR THEIR APPROVAL. ONLY DETAILS IN THE REQUEST SECTION (SECTION I) ABOVE WERE CONSIDERED IN THE APPROVAL GRANTED.

SECTION IV – Computer and Admin Services:**SECTION V – Ordering Document Details****Instructions - Fill in all sections completely.**

APPROVAL REQUIREMENTS - Refer to the Approval Matrix at <http://esource.oraclecorp.com>

PRICING REQUIREMENTS – Refer to Price List and Price List Supplement for minimums and prerequisites.

PRICING SPREADSHEET – Include a pricing spreadsheet showing all products, quantities, license types, pricing, and discounts. Indicate if discount for drafting contract differs from approved discount.

MIGRATIONS - If your deal contains a migration, you must submit a Migration Worksheet to the ELM (eBusiness License Migrations) team. Refer to <http://nafo.us.oracle.com> under the Contract Management tab and e-Business License Migrations header to download the spreadsheet and for additional information.

Note: All business approvals & quotes are valid through the quarter they were approved, unless a formal RFP or Tender requires a longer validity period.

General Information	
Contract requested by (insert date): After all approvals are obtained - Allow 24 hours for standard contracts and 48 hours for non-standard contracts.	
Opportunity I.D. (OSO Number):	
Is this a ship order?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Deal Structure (indicate Direct, Pass-Through, Sublicense, or Trial License):	
Is this deal the result of a compliance issue that LMS has been involved in?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does deal contain new licenses with an <i>approved</i> non-supported license type (i.e. metric is not nor ever has been on Oracle's price list):	<input type="checkbox"/> Yes (specify non-supported license type and eBusiness license type used to determine conversion) <input type="checkbox"/> No
Quote Valid Through (insert date):	
Partner (insert name, if applicable)?	Margin or % of net license fees _____
VAD (insert name, if applicable)?	Margin or % of net license fees _____
PARTNER PAYMENT: If this is a direct deal, does it involve a Partner Referral Fee?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, specify payment type:	<input type="checkbox"/> Applications Affiliate Fee <input type="checkbox"/> ROP Fee (<i>GB Use Only</i>)
MIGRATIONS OR UPDATES:	<input type="checkbox"/> Yes <input type="checkbox"/> No
PREMIUM SERVICES:	<input type="checkbox"/> Yes <input type="checkbox"/> No
INCIDENT PACKS:	<input type="checkbox"/> Yes <input type="checkbox"/> No
INTERNATIONAL: Requires an International Notification Form to be forwarded to your manager, contract specialist, and NASINFO or OGEHINFO.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Payment Terms:	<input type="checkbox"/> Net 30 <input type="checkbox"/> Other (Specify) _____

Referenced Agreement:	<input type="checkbox"/> New OLSA
	<input type="checkbox"/> Other (Specify)

Customer and Administrative Information – all fields must be filled in	
Customer's EXACT Legal Name:	
Business Address:	
City / State / Zip:	
Customer Contract Admin:	
Phone #:	
Fax #:	
E-mail ID:	
Billing Contact:	
(Partner/VAD if Indirect):	
Address:	
City / State / Zip:	
Phone #:	
Fax #:	
E-mail ID:	
Tax Status :	Exempt ____ (Need certificate for ship to state if not on Oracle's Tax Exemption Log)
	Non-Exempt ____
Shipping Contact:	
Address:	
City / State / Zip:	
Phone #:	
Fax #:	
E-mail ID:	
Technical Support Contact:	
Address:	
City / State / Zip:	
Phone #:	
Fax #:	
Email ID:	
Partner Name (Indirect):	
Address:	
City / State / Zip:	
Contact Admin:	
Phone #:	
Fax #:	
E-mail ID:	

Education (EPPC)	
Education Prepaid Credit Amount:	\$ _____
Education Discount:	_____ %
Education Revenue:	\$ _____
Education Sales Rep:	

PROCESSOR/NAMED USER PROGRAMS/COMPUTER PROGRAMS (REQUIRED INFORMATION)

Make and Operating System required for each program:

Make:

OS:

PROGRAMS:

Applications		
Will applications be modified:	Yes	No
Will users be accessing modified Apps from the web:	Yes	No
Have all prerequisites been included:	Yes	No
Will users use Fast Forward RPM:	Yes	No
Will applications be hosted:	Yes	No
Indicate database that Apps will run on:		
Indicate CSI for existing prerequisite database and tools:		

Options not requiring HQAPP, Tier 1, or Tier 2 Approval	
(1)	
(2)	
(3)	
(4)	

Internal Administrative Information	
Applications Sales Manager	
Technology Sales Manager	
Account Manager	
OracleDirect Rep	
Education Sales Rep	
Support Renewals Rep	
Premium Support Rep	
Migrations Manager	
Is there a teaming agreement?	<input type="checkbox"/> Yes (if yes, list all appropriate reps) <input type="checkbox"/> No
Requester:	Name: _____ Business Telephone: _____ Cell Phone: _____